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Category Predication Work, Discursive Leadership and Strategic Sensemaking

Andrea Whittle

Newcastle University

William Housley

Cardiff University

Alan Gilchrist

Lancaster University

Frank Mueller

Newcastle University

Peter Lenney

Lancaster University

Category Predication Work, Discursive Leadership and Strategic Sensemaking

Abstract

Categorisation is known to play an important role in organizations because categories ‘frame’ situations in particular ways, informing managerial sensemaking and enabling managerial intervention. In this paper, we advance existing work by examining the role of categorisation practices in discursive leadership during periods of strategic change. Drawing on data from an ethnographic action research study of a strategic change initiative in a multi-national corporation, we use Membership Categorisation Analysis to develop a framework for studying ‘category predicates’ - defined as the stock of organizational knowledge and associated reasoning procedures concerning the kinds of activities, attributes, rights, responsibilities, expectations, and so on that are ‘tied’ or ‘bound’ to organizational categories. Our analysis shows that discursive leadership enabled a radical shift in sensemaking about organizational structure categories through a process of ‘frame-breaking’ and ‘re-framing’. In so doing, the leader co-constructed a ‘definition of the situation’ that built a compelling ‘vision’ and concrete ‘plan’ for strategic change. We go on to trace the organizational consequences and material outcomes of this shift in sensemaking for the company in question. We conclude by arguing that ‘category predication work’ comprises a key leadership competence and plays an important role in organizational and strategic change processes.

Keywords: Discursive Leadership, Ethnomethodology, Membership Categorisation Analysis, Politics, Power, Sensemaking, Structure, Strategy.

INTRODUCTION

In this paper, we seek to contribute to the field of discursive leadership (Clifton, 2006; Fairhurst, 2007, 2011; Kelly, 2008; Svennevig, 2008; Zoller & Fairhurst, 2007) and strategic sensemaking (Weick, 1969, 2001, 2009; Brown, 1994; Patriotta, 2003; Maitlis, 2005; Maitlis & Lawrence, 2007; Brown, Stacey & Nandhakumar, 2008; Sims, Huxham & Beech, 2009) by developing insights into membership categorisation practices in strategy meetings. Existing research has shown that the ability to shape and direct stakeholder sensemaking through discursive practices – both in the form of talk-in-interaction and written text – is a key leadership skill (Greatbatch & Clarke, 2003; Clarke & Greatbatch, 2004; Fairhurst, 2007; Maitlis & Lawrence, 2007; Iszatt-White, 2009). Thus, sense-making (the ability to make sense) and sense-giving (the ability to shape the way others make sense) are key topics for the field of leadership (Gioia & Chittipeddi, 1991; Maitlis, 2005). Leaders are known to play a key role in ‘framing’ (Fairhurst & Sarr, 1996; Fairhurst, 2011) complex and ambiguous situations and events, in order that others can make sense of them (Gioia et al., 2010: 41).

How a situation is ‘framed’ is important because it influences how people think, feel and act towards that situation. Framing is also a necessary part of organizational change, given the need for members to shift their way of thinking in order to problematize the ‘old’ ways of working (or ‘frame-breaking’) and envisage new ways of doing things (or ‘re-framing’). Frames can become so taken-for-granted that it is hard for people to ‘see’ or ‘do’ differently, which is why, we suggest, that ‘frame-breaking’ and ‘re-framing’ is important for the management of change (Creed et al., 2002). Categories are crucial in framing, for management in particular, because they provide a way of giving meaning to actors or events and providing forms of reasoning about how they can be acted upon and ‘managed’: “(s)ensemaking is about labelling and categorizing to stabilize the streaming of experience” when communicating (Weick et al., 2005: 411).

We seek to advance the fields of discursive leadership, strategy and sensemaking by building on existing efforts in utilizing ethnomethodology and Membership Categorization Analysis (MCA), and developing the notion of ‘category predication work’ as a strategic competence. MCA, with its ethnomethodological roots, offers a complementary but distinct approach to studying categorisation in organizations (c.f. Ashforth & Humphrey, 1997). Existing work on categorisation has shown how categories act as ‘framing devices’ by giving

meaning to events in ways that enable them to be understood and acted upon (Fairhurst, 2007: Ch.3). Moreover, research has shown how categories have significant organizational consequences, such as resource allocation (Samra-Fredericks, 2003; 2004; 2004a; 2005), and can even have ‘life or death’ consequences during crisis situations (Fairhurst, 2007, 52-53; Weick & Sutcliffe, 2007: Ch1). Whilst existing research has tended to focus on how categories perform ‘framing’, our aim here is to focus on an equally important but less understood phenomenon: *how categories are themselves framed*. With reference to Edwards’ (1994) distinctions, our perspective views categories as flexible and malleable linguistic resources, not pre-formed, already-made cognitive schema.

Existing research has shown that categories enable ‘framing’ as a result of the ‘stock of knowledge’ and associated ‘reasoning procedures’ concerning what certain categories of person (such as ‘Managing Director’, ‘receptionist’, ‘Sales Director’) typically can, or should, ‘be’ or ‘do’ (Fairhurst, 2007: Ch3). Existing research has also shown how categories are normatively organized (Hester & Eglin, 1997; Housley & Fitzgerald, 2009), such that certain category predicates – such as activities, attributes, rights, responsibilities, or knowledge-claims - are viewed as ‘properly’ associated with particular categories (Fairhurst, 2007: 51)¹. Categories ‘go together’ with certain *normative* and *moral* expectations, rights and responsibilities: we expect impartiality from auditors in a way we would not expect it from consultants, for example. What is needed, then, and what our work seeks to provide, is a framework that not only enables us to understand which categories are used to ‘make sense’, but one that also enables us to explicate the forms of category-bound knowledge and category-bound reasoning – or more simply *category predicates* (Fairhurst, 2007: 51) – that enable key organizational processes such as strategic decision making and organizational change to happen. Larsson and Lundholm (2013: 1108) define category predicates as “conventionally anticipated features” of category incumbents, which may include actions as well as right and obligations.

As Samra-Fredericks (2010: 2154) notes, “categories ‘carry’ sets of category-bound activities, predicates or rights and obligations (moral orders) that are expectable for an incumbent of that category to perform or possess”. For us, as for Samra-Fredericks, these categories and associated predicates should not be seen as *fully pre-formed* or *fixed*, i.e. already there and available for us. Rather, following Edwards (1994), they are a flexible and malleable linguistic resource for practical use in social actions. Hence, we propose that such

¹ A predicate is usually defined as a property or characteristic that a subject has or is. It provides information about what the subject is (or should be) like, or what the subject is (or should be) doing.

category predicates need to be examined for what they *practically achieve* in certain specific contexts. For example, the predicate ‘acting politically’ can have different meanings and fulfil different practical functions (Edwards, 1994: 220) in different specific situations - it could mean (positively) astute or (negatively) self-interested.

In this paper, we provide an MCA analysis of the situated accounts produced by the project leader of a strategic change initiative in a multi-national company. The leader was an action researcher who acted as an (unpaid) management consultant. We also follow the series of wide-reaching organizational changes that were implemented over the three year period of the change project in order to trace the organizational outcomes of the ‘frame shift’ that occurred during the project. Our study contributes empirically to the field by showing how the leader’s re-framing of the formal organizational structure – in particular the *category-bound activities and attributes*, (i.e. predicates), associated with *organizational structure categories* (e.g. ‘sales manager’, ‘marketing director’, etc.) – enabled or obstructed organizational change.

In terms of our wider theoretical contribution, we develop the concept of *category predicates* and propose a framework for studying *category predication work*, which we define as the ‘framing’ work involved in maintaining (or disrupting) the more or less shared, and more or less stable, category-bound knowledge and category-bound reasoning about the activities, attributes, rights and responsibilities associated with particular organizational categories. As Fairhurst (2007: 51) argues, “category predicates thus reveal the stock of culturally-based, common-sense knowledge” that members use to make sense of ‘what happened’ (retrospectively) or ‘what should happen next’ (prospectively). Our emphasis on the term “more or less stable” is important because, as our study seeks to show, category predicates are not fixed and can be actively ‘disrupted’ and ‘shifted’ during periods of organizational change. Nor are category predicates necessarily universally shared and accepted. We therefore view category predicates not as fixed properties of particular entities (persons, events, objects, etc.) but rather as perpetually ‘in motion’ and ‘in the making’ (Boden, 1994). Indeed, our study reveals how the stock of knowledge and reasoning procedures associated with categories were not fixed properties of the persons (e.g. ‘Sales Director’) or the company, but were actively ‘re-framed’ through the discursive leadership of a project leader.

As such, we contribute to the field of management and organization studies more generally, by developing a framework for studying the forms of background knowledge and reasoning associated with categories – or ‘category predication work’ – that enables us to

study the accomplishment of what Boden calls ‘organization in action’ (Boden, 1994). Furthermore, by showing how organizational categories can themselves be re-framed, we also advance knowledge of how organizational change is accomplished through discursive leadership practice (Zoller & Fairhurst, 2007; Wodak et al., 2011; Carroll & Simpson, 2011). Our study also provides additional evidence to support the theory that patterns of leader and stakeholder sensemaking – in our case sensemaking amongst middle managers and an external change agent – play an important role in shaping organizational processes and outcomes (Maitlis & Lawrence, 2007: 57; Gioia & Chittipeddi, 1991; O’Connell & Mills, 2003; Maitlis & Sonenshein, 2010; Marshall & Rollinson, 2004; Weick, Sutcliffe & Obstfeld, 2005; Tourish & Robson, 2006).

LEADERSHIP AND SENSEMAKING

Existing literature has given us many insights into the role of sensemaking in organizations (Weick, 1969; 2001; 2009). In this discussion, we will focus in particular on the role of *leaders* and *discursive processes* in shaping sensemaking, given our focus on discursive leadership. For both Brown (1994; 1995) and Maitlis (2005), as for us, language is important because it is primarily through the accounts, narratives and stories that organizational actors shape the interpretation of others. This links to the idea of ‘framing’ (Goffman, 1974; Creed et al., 2002), because it is primarily through language, and other forms of symbolic interaction, that reality is given meaning (Shotter, 1993). Leadership, then, involves the management of meaning and the active ‘shaping’ of interpretations (Carroll & Simpson, 2011).

Gioia and Chittipeddi (1991) have shown how sense-making and sense-giving are crucial for the early phases of strategic change initiatives, in particular the role of top management in creating, instilling and energizing stakeholders towards a new ‘vision’. Sense-giving is highlighted as a particularly important leadership capability, which is defined by Gioia and Chittipeddi (1991: 442) as the “process of attempting to influence the sensemaking and meaning of others toward a preferred redefinition of organizational reality”. Maitlis (2005) also shows how sensemaking and sense-giving is essential for managers, as they face uncertainty and ambiguity in their organizational environment and are tasked with persuading others to follow their preferred vision. Sense-giving by leaders is known to have far-reaching implications for organizational processes and outcomes, including resource

allocation, organizational structure, organizational culture, stakeholder satisfaction and levels of identification and commitment to the organization (Gioia & Chittipeddi, 1991; Gioia et al., 2010; Bartunek et al., 1999; Maitlis, 2005; Balogun & Johnson, 2004; 2005; Maitlis & Lawrence, 2007; Jarzabkowski & Balogun, 2009).

Existing literature has given us many insights into how sensemaking influences strategic and organizational processes, and how leaders influence the sensemaking of others through sense-giving. However, it is noteworthy that comparatively little research has yet been carried out on membership categorisation practices, in particular on organizational structure categories more specifically. Studies by Gioia and Chittipeddi (1991) and Balogun and Johnson (2004) have advanced our understanding of how organizational structure change occurs. Our aim is to extend and enrich this work by showing how formal organizational structure categories are *made meaningful in situ* during real-time strategic interaction – which is important given the centrality of meaning-making in the sensemaking field. In particular, our ethnomethodological perspective can help us to uncover the forms of *background knowledge*, *‘folk epistemology’* and *reasoning procedures* (Schutz, 1967; Garfinkel, 1967; Moerman, 1987: 109) that render categories such as ‘President’, ‘CEO’ or ‘Core Division’ meaningful for those concerned.

We are guided by Bittner’s (1965: 77) argument that formal organizational designs, rules and structures are themselves “schemes of interpretation”. Bittner (1965: 71) puts forward an important research agenda:

“... the meaning and import of the formal schemes [e.g. organizational rules, roles, structures, etc.] must remain undetermined unless the circumstances and procedures of its actual use by actors is fully investigated.”

Formal structures, then, do not determine organizational processes or outcomes, and organizational behaviour cannot be ‘read off’ from the formal structure chart. The fact that organizational behaviour rarely looks identical to the formal organizational chart is not evidence of ‘misbehaviour’ amongst members. Rather, it is simply part and parcel of the *methodical use of the formal organization as a scheme of interpretation* (Bittner, 1965). Hence, we argue that competent and sanctioned members *use* such structural categories as part of their common-sense organizational reasoning, such as reasoning about who should do what (i.e. functional division of labour) or who has the power to authorise action (i.e. hierarchical chain of command). The task of analysis, therefore, is not to measure the effects of the formal organizational structure on organizational action or outcomes, such as whether a

‘flatter’ or ‘decentralised’ organizational structure led to improved performance or productivity, but rather to examine how members use the categories of formal organizational structure as part of their common-sense reasoning and decision-making - what Boden (1994) calls “structure-in-action”, drawing from Giddens. What is typically used as an unexplicated resource for analysis – the common-sense knowledge and reasoning about formal organizational schemes – is here turned into a topic of analysis itself. We now turn to explain in more detail the ethnomethodological perspective we adopt.

ETHNOMETHODOLOGY AND ORGANIZATION-IN-ACTION

Ethnomethodology has been described as the “science of sensemaking” (Heap, 1975, cited in Gephart, 1993: 1467). However, it has received surprisingly little attention in the mainstream sensemaking literature (for important exceptions see Gephart, 1993; Samra-Fredericks, 2010; Fairhurst, 2007). Samra-Fredericks (2010: 2147) defines ethnomethodology as the study of “the mundane, practical work of society’s members’ sense-making practices and how they reproduce social-moral orders” (see also Rawls, 2008). Ethnomethodology, including the sub-fields of conversation analysis (CA) and membership categorisation analysis (MCA), is characterised by diversity, controversy and internal dispute more than coherence, complementarity and homogeneity (see e.g. Atkinson, 1988; Sharrock, 1989).² Our focus in this discussion will therefore be restricted to those concepts most relevant to our analysis, in particular Boden’s (1994) ‘organization-in-action’ model and Membership Categorisation Analysis (MCA).

MCA is valuable for studying strategic sensemaking and leadership because leadership is enacted in and through discursive practices: *leading happens largely through talking*. Thus we can ask “How precisely is leadership ‘accomplished’, discursively speaking?” (Wodak et al., 2011: 593) For the action model of organization first put forward by Silverman (1970) and advanced by Boden (1994), such activities are not “just talk”, to be separated from the ‘real business’ of work, but are constitutive of ‘the organization’. In this paper, we focus in particular on how organizational structure is made sense of as categories

² Hence, ethnomethodology is perhaps best understood as a loose collection of splintered sub-fields rather than a single ‘perspective’. Given space constraints, we will not discuss all of the central tenets of ethnomethodology here – interested readers are invited to look at Lynch and Sharrock (2011) and Button (1991) for a good general introduction and overview, or Samra-Fredericks and Bargiela-Chiappini (2008) in relation to management and organization studies more specifically.

that are being oriented to and deployed within the sense-giving practices of leaders (Bartunek et al., 1999; Maitlis, 2005).

Membership Categorisation Analysis

The branch of study known as Membership Categorisation Analysis (MCA) that emerged from the work of Harvey Sacks (see e.g. Jayussi, 1984; Hester & Eglin, 1997; Housley & Fitzgerald, 2002, 2003, 2009; Fairhurst, 2007: Ch 3; Hester & Hester, 2012) has seen something of a revival in the social sciences in recent years (Hester & Eglin, 1997; Housley, 1999, 2000a, 2000b; Housley & Fitzgerald, 2002, 2009; Watson, 1978, 1997). However, its use in the field of management and organization studies has been more limited. This is a problem, in our view, because categorisation is an important part of management and leadership practice. Leiter (1980: 150) explains the importance of categorization as follows:

“Categorization, or the classification of objects into groups, is essential for the stable character of social reality. Without categories, the world would be without shape and order. Everything would be unique. We impose stability upon the world by categorizing - by linking and grouping objects into classes.”

These ‘objects’ referred to here can be anything from material artefacts (e.g. chair, table, building and so on), to observable actions (e.g. gesture, facial expression, bodily position and so on), to individual persons (e.g. woman, mother, Marketing Manager, and so on), to entire social institutions (e.g. the police, management, and so on). Categorisation practices are central to Alfred Schutz’ notions of types and ‘typification’, Erving Goffman’s notion of the ‘frame’ and W. I. Thomas’ concept of the ‘definition of the situation’ (see also Coulon, 1994: 9).

Categories of social actors (individual or collective) are rendered intelligible through membership categorisation devices (MCDs). MCDs furnish us with knowledge of the types of activities, rights, obligations, expectations and so on associated with categories of persons – what are referred to as ‘category predicates’ (Housley & Fitzgerald, 2002: 63; Fairhurst, 2007: 51; Samra-Fredericks, 2010: 2154). MCDs therefore provide us with an ‘inferential apparatus’ (Sacks, 1972, cited in Butler, et al., 2009: 4) – the ability to ‘interpret’, ‘read’ or ‘recognize’ an action or utterance. For example, “The chicken died. The villagers celebrated” might not make sense to the reader, but it might make sense to members of the Azande tribe of Central Africa, given their knowledge of the poison oracle device and their ability to

‘recognize’ causal connections where others might not (Evans-Pritchard, 1937/76; Pollner, 1987: 54-58). It is not the category *per se*, then, but the stock of cultural knowledge and reasoning procedures used to make sense of the situated use of categories that is the focus of ethnomethodological studies (Rawls, 2008). We follow Edwards (1994, 1995) in viewing categories, and category predicates, as *flexible linguistic resources* rather than, say, *individual cognitive processes* that perform information processing functions (see e.g. Balogun & Johnson, 2004). Their usage in linguistic description is emphasised over their role in private cognition.

More specifically, our focus here is on the stock of *organizational* knowledge, and associated *managerial* reasoning procedures, that enable strategic sensemaking and strategic change. In organizational contexts, categories can play an important role in what rights, obligations, knowledge, activities and so on are bound to organizational structure categories such as “secretary”, “manager” or “Chief Executive”. Housley (1999) also shows how categories such as ‘role’ are important as interactional resources for decision-making, displaying ‘knowledgeability’ and rendering certain accounts authoritative. Samra-Fredericks (2003) also shows how membership categories such as “accountant” are used as a method for invoking (or contesting) claims to knowledge and legitimating a particular definition of the organizational situation, with implications for the strategic decisions that flow from them.

Categorisation is part of the ‘moral order’ of society and categories therefore have normative and moral dimensions (Jayussi, 1984; Housley & Fitzgerald, 2009). For instance, describing someone as ‘playing politics’ often has the negative moral connotation that they are acting ‘improperly’, in narrow self-interest, rather than for the benefit of the organization. We therefore start from the premise that category-use also displays members’ moral work and normative assessments (Watson, 1978; Jayyusi, 1984; Housley & Fitzgerald, 2007), such as who *should* do what, why and when. This concept of normative assessment is important because we seek to show how moral reasoning about organizational structural categories plays an important role in strategic change.

MCA views culture not as a set of norms and values that are internalised by members and govern their conduct, what is sometimes referred to as the ‘cultural dope’ assumption, but rather as the “situated application of shared common-sense understandings” (Butler, et al., 2009: 5; Garfinkel, 1967). To capture this view of culture as an on-going social process rather than a static entity, Hester and Eglin (1997) refer to “culture-in-action” and Moerman (1987) refers to ‘talking culture’. Here, we follow Boden’s (1994) use of the term “organization-in-action” but focus more narrowly in our study on the formal organizational *structure* (i.e. the

functional and hierarchical division of labour, authority relations, roles and responsibilities). Hence, we use the term “*structure-in-action*” (Boden, 1994: 8), a concept which draws on the structuration theory of Giddens, to describe our ethnomethodological approach to studying organizational structure.

METHODOLOGY

Methodological framework

The methodological framework we adopt follows closely the work of Boden (1994) in organization studies and Samra-Fredericks (2003, 2005, 2010, 2011) in the field of strategy-as-practice. The study of organization-in-action (Silverman, 1970; Boden, 1994) is distinct from other approaches influenced by the so-called ‘linguistic’ turn, including narrative analysis (e.g. Brown, 1998), Critical Discourse Analysis (e.g. Vaara & Tienari, 2008), Foucauldian-inspired work (e.g. Knights & Morgan, 1991), and other forms of discourse analysis (e.g. Hardy et. al., 2000). All of these approaches demonstrate a systematic tendency to ‘jump over’, as Samra-Fredericks (2003) terms it, the organization of talk-in-interaction and use talk or text as a ‘resource’ for making conclusions about something else altogether, such as dominant stories, subject positions or ideological formations. Instead, in line with EM we privilege the most basic, but most important question of *how* people constitute a particular social setting through their talk, embodied gestures, and other forms of social conduct (Silverman, 1970).

Accounts are the central focus of MCA. Accounts are understood by Maitlis (2005: 23) as follows:

“As discursive constructions of reality that provide members with ordered representations of previously unordered external cues, accounts describe or explain the world and thus make it meaningful ... constructing ordered relationships amongst sets of entities (events, people, actions, things) in ways that enable people to act or at least to decide to act.”

Ethnomethodologically-informed studies tend to adopt a particular attitude to the recording and analysis of naturally-occurring social interaction (Rawls, 2008). As Llewellyn (2008: 763) explains, by recording (video or audio) actual work activities, slowing them down and subjecting them to repeated analysis, “the analyst can start to recover how real-time work activities are produced in light of distinctive organizational contingencies and

accountabilities. Organization is revealed, as an inter-subjectively recognized order, at a very fine level of detail". The recording of real-time interaction enables us to study the fine-grained, moment-by-moment, accomplishment of workplace and organizational activities (Samra-Fredericks & Bargiela-Chiappini, 2008; Llewellyn, 2008: 763). Recording and transcription is undertaken to enable the analyst to make a permanent record of moments within the continuous stream of everyday interactions, records that enable the analyst to 'slow down' everyday life and subject it to repeated, detailed examination (Carroll & Simpson, 2012: 1301).

Ethnomethodologically-informed studies tend to adopt two main strategies for analysing recorded interaction: (a) extended sequence analysis from within a single 'case', or (b) collection studies (ten Have, 2004; Rawls, 2008). The latter involves collecting recordings of a large data-set of similar - typically short and 'routinised' - interactions and is most useful for understanding the routine features of particular mundane or institutional interactions, such as answering the telephone or delivering a diagnosis to a patient. The former is more relevant in our case, as extended sequence analysis enables the analyst to focus on the development of an interaction across an extended fragment of talk, within its local situated environment. The strategy meetings that were recorded were not of a routine, repetitive nature, and whilst organizational structure categories were of course frequently used by the members, there were no other 'similar' occasions that would have enabled a meaningful 'collection' to be generated.

Single cases, or indeed single extracts, are not an analytical 'problem' for ethnomethodologically-informed studies, given that EM does not share the same epistemological assumptions about 'validity', 'objectivity' and 'generalisability' as mainstream social scientific perspectives (Rawls, 2008). For EM, 'rigour' is instead provided by the fine-grained analysis of first-order category use *in situ* through a cumulative paradigm of inquiry. Thus, our findings do not rest on the idea that our study reveals evidence of 'typical' or even necessarily 'prevalent' forms of membership categorisation practice – indeed, we would invite further study of other organizational settings to enable a body of knowledge to accumulate about how members use organizational structure categories to make sense of, and enact, organizational change more generally.

Data collection

This paper draws on data from a three year participant observation 'action research' study (Lüscher & Lewis, 2008) of a strategic change initiative in the UK subsidiary of a US-based

multi-national corporation in the branded apparel industry. The data collected included semi-structured interviews, field-notes, audio recordings of key meetings, and various organizational documents and communications (emails, phone calls, etc.). This paper seeks to combine the fieldwork insights from the longitudinal participant observation with more fine-grained MCA analysis. As Samra-Fredericks (2003) shows in her use of fine grained interactional analysis coupled with broader ethnographic fieldwork, the latter enables the analyst to produce contextually-informed readings of members' interactions (Randall, et. al., 2001; Samra-Fredericks, 2003) and also enables a more *longitudinal tracking* of key organizational events and outcomes (see Figure 2).

The extract upon which we draw involves a series of accounts produced by an action researcher ('Justin') who was employed as an (unpaid) management consultant to lead a strategic change initiative. Justin was invited to work for the company to help them develop a new Key Account Management Strategy. Part of the 'quid pro quo' (quote from Meeting 1) for undertaking the management consultancy work without receiving payment was that Justin would be given permission to tape-record the strategy meetings, in addition to conducting interviews, work-shadowing and collecting documents of various kinds, for his doctoral research. The company was clearly impressed with his work in the first year and wanted to keep his 'services' as a management consultant, so they instructed him as the 'project leader' of the new "Steering Group" (comprising senior managers from different departments) that would devise and implement the new strategy, as well as jointly funding another (industry experienced) doctoral researcher to work alongside him.

This extensive data-set, comprising almost three years of change activities (from 2002 to 2005) led by the two action researchers, was later opened up for secondary analysis six years after they left the field. The data-set was shared with a wider team of researchers (subject to the same anonymity and confidentiality agreement) with a view to gaining new insights, from different theoretical perspectives, into topics such as strategic planning, leadership and organizational change. It is important to note that Justin was *part of* the 'naturally occurring' setting he was studying: he was invited to be there, and was asked to lead the project by the Managing Director, who appointed him as project leader. For EM, being so 'close' to the setting is not a methodological problem but a methodological *advantage*. Moreover, the Steering Group members *demonstrably oriented to him* as a 'leader' in the meetings we have analysed - for example, by asking him for his diagnosis and advice about the company's 'problems' so they could develop their 'strategic plan'. Thus, the categories 'leader' and 'strategy' were not imposed by the analysts but were used by

members of the group themselves, both explicitly and *en passant* ('in the doing') (Schegloff, 1979).

This paper draws on a single, extended extract from the first strategy meeting led by Justin. Justin was already known to the members of the Steering Group, having been in the firm for over a year and having interviewed them all previously. The first Steering Group meeting was a particularly rich source of data for furthering our understanding of 'framing' and the 'definition of the situation', because it was where the group spent considerable time building up a working definition of who or what they were, what they could (or should) do, and what the competitive environment in which they worked was like. Sensemaking practices are often hard to notice because they are normally done in ways that members, and analysts alike, take for granted (ten Have, 2004). Hence, studying situations in which sensemaking is particularly *acute*, or particularly *problematic*, for members is an important methodological strategy for studying sensemaking (ten Have, 2004: 53; Weick & Sutcliffe, 2007).

FINDINGS: CATEGORY PREDICATE WORK, STRUCTURE-IN-ACTION AND STRATEGIC SENSEMAKING

The detailed analysis we undertake in this section is taken from the first meeting of the newly formed strategy 'Steering Group'. The agenda for the first meeting was to review the 'findings' from the earlier 'illuminative evaluation' (Parlett, 1981) interviews conducted by Justin, along with other data from the company's own market research, and formulate a new Key Account Management (KAM) Strategy. Justin, the action researcher who was employed as a management consultant to lead the strategy project, began by talking through his PowerPoint presentation (see Appendix 1) summarising his key findings and recommendations as a consultant.

We join the discussion about an hour and a half into the meeting. As Justin talked through his PowerPoint slides (see Appendix 1), the Steering Group discussed what kind of change they would like to see happen, and how they thought they could make it happen. Having already established the 'dire need' for strategic change – specifically in relation to cross-functional working (referred to in our extract as becoming 'integrated' [Line 4] and increasing 'coordination of functions' [Line 57]) when dealing with 'key account' retail customers – the discussion moved onto more practical questions such as: is a major strategic change in KAM possible? If so, how should it be done? And who is best placed to do it?

For analytical purposes, we have broken the excerpt into shorter fragments, however they should be read sequentially using the line numbers are provided. A diagrammatic representation of the stages of ‘framing’ undertaken in the episode is provided in Figure 1 and a table of the categories and category predicates involved in the episode is provided in Table 2 at the end of the analysis.

--- Insert Figure 1 here ---

Formal organizational role and job titles are also provided in Table 1.

Pseudonym	Description
Justin	Researcher/change agent/consultant
Kate	Trade Marketing Manager
Sue	Customer Operations Manager
Bill	Consumer Marketing Manager
Dennis	Managing Director
Sam	Sales Director
Dominic	Customer Operations Director
Bernard	Finance Director
Don	Ex Marketing Director
Mark	Marketing Manager
Neil	National Account Sales Manager

Table 1 – List of pseudonyms

Excerpt 1

- 1 Justin: Right. And I'm coming to the next one yes and it's (.1) eh (.)
- 2 that's how it's going to change because what's going to
- 3 happen is the conversation that you four have with the Board
- 4 will be more integrated=
- 5 Kate: =Mm
- 6 Justin: (.7) so they'll then start to change (.) but they're not going to
- 7 change personality overnight, Sam's going to be Sam,
- 8 Dominic's going to be Dominic right, Bernard's going to be
- 9 Bernard. They (.) they (.) they're not going to change their
- 10 way of behaving quickly (.) right?
- 11 Kate: We're going to have to be a bit brave if we are going to have
- 12 these conversations and have more integrated plan (.) then if
- 13 there isn't going to be any change then =
- 14 Justin: =>Well there will be<=
- 15 Kate: =Right=
- 16 Justin: =↑>no they WANNA change<=
- 17 Kate: =Right=

The project leader Justin initiates a discussion around the topic of how the group will undertake the strategic change. Reference to ‘how it’s going to change’ (L. 2) is made and is attributed to a more ‘integrated’ conversation that ‘you four’ (L. 3) (the four Steering Group members present) are to have with the Board of Directors. Justin is proposing a radical change to existing practices in FitCorp, towards a more cross-functional integration across key account customers, to be led by the Steering Group themselves. The frame that is beginning to be ‘broken’ here is implied rather than explicit. In FitCorp, just like in most companies around the world, issues of strategic change had been undertaken predominantly at the very ‘top’ of the organization, at Board of Directors or Top Management Team level. Hence, Justin’s proposal – that this group of *middle* managers, who are hierarchically *subordinate* to the Board, should ‘dictate’ and ‘lead’ his proposed change agenda – constitutes an attempt to ‘break’ the pre-existing ‘script’ (Edwards, 1994) of “who should do what” in the company. Indeed, up until this point, the middle managers in the Steering Group had done exactly that: simply implemented the decisions made by the Board. The very fact that Justin spends so much time explaining and justifying his proposals is testimony to this ‘frame-breaking’ move he is proposing. Proposals, plans and activities which fit within existing frames of what certain categories of actor ‘should typically do’ normally do not require much, if any, ‘accounting work’: they are widely accepted and taken-for-granted. Cleaners are expected to undertake cleaning duties, administrators are expected to undertake administrative duties, just as top managers are expected to undertake tasks such as ‘leading’ and ‘making strategic decisions’. Hence, Justin’s extended account that follows is designed to ‘break’ and change the group’s pre-existing ‘master frame’ for making sense of who should take responsibility for leading the strategic change that, from his perspective, FitCorp needs to embark upon to remain competitive.

How, then, are categories and category predicates used by Justin to undertake this ‘frame breaking’ activity? Category predicates are invoked from the start through the use of the hierarchical category ‘Board’ at line 3. This category carries with it a category predicate based on hierarchical authority relationships, and thus frames the relationships between the two groups in terms of superordinate and subordinate positions. As such, it invokes pre-existing expectations around who is ‘in charge’: the very ‘master frame’ that Justin is seeking to ‘break’ and change here. At lines 6 and 7 a predicate of the category ‘Directors’ is then referenced through the use of the term ‘personality’. Here, the incumbents of the role “Directors” are predicated with a particular type of ‘personality’ (L. 7) which tells us about their (likely) characteristics and behaviours. This category predicate is used by the leader

Justin to frame the organization as one that is formally ‘led’ by a top management team that is unlikely to change their way of behaving swiftly (‘not going to change personality overnight’, L. 7). The Board of Directors, he claims, are unlikely to undertake any rapid change in attitudes or behaviour themselves (L. 10). This is the first discursive ‘move’ used by Justin to justify his radical proposal for ‘turning on its head’ the relationship between the Steering Group and the Board.

This opening account by Justin mobilises two predicates associated with the category Board of Directors (personality and organisational hierarchy) and in doing so it frames FitCo as in need of strategic change, but beset with the problem of a top management team – who are normally expected to lead such initiatives (hierarchical predicate) – that are slow to change and somewhat ‘set in their ways’ (personality predicate). However, it is clear that some of the Steering Group members present are not yet fully convinced that change is possible, or that they are best placed to lead the change initiative. Kate interjects and presents two further ‘problems’: (a) that leading the change themselves – and effectively ‘breaking ranks’ in so doing – will require considerable ‘bravery’ (L. 11), and (b) that such efforts will be futile if the Board are never going to change (L. 13). This first problematisation is interesting in three ways; firstly being brave can be understood as a personality trait, secondly it is associated with difficulty or adversity, and thirdly it is associated with unequal power or resources. This displays a sense of the relationship between the group present and the board as one which is not *symmetrical*.

Furthermore, in her second problematisation, Kate also re-casts the predicate ‘personality’ introduced by the project leader. What for Justin is evidence of the need for the group to lead change (the Board will not change readily, so the Steering Group should take the lead), Kate re-casts as pointing to the *futility* of whole initiative (the Board will never change, so why bother trying?). This example shows that category predicates – in this case ‘personalities’ – do not have a fixed meaning. This predicate – personality – was neither inherently ‘good’ nor ‘bad’ for the group and their change plans. Rather, its meaning was negotiated within the interaction. The implications of Kate’s interpretation for the group’s plans are profound: they should “give up” before they had even started because change is impossible. In response, Justin quickly reaffirms his own interpretation, securing some partial realignment on L.15, by declaring that members of the board, despite their personalities, have a motive for change: “they WANNA change” (L.16). The category predicate ‘having a motive’ is hereby used by Justin to attempt to convince Kate that change *is* possible in spite of

its difficulty. This is met by a repeat token ('Right', L.17) which displays further alignment and agreement with Justin's definition of the situation.

To sum up, in this early part of the exchange, Justin enacts *discursive leadership* by (a) framing the organization as an entity which needs to change, (b) framing the Board of Directors as ill-placed to lead any rapid transformation, (c) positioning the Steering Group as change leaders, and (d) aligning the sensemaking of others, namely Kate, with the view that change is possible, albeit difficult. This process is diagrammatically represented in section A of Figure 1.

Excerpt 2

18 Justin: = ↑No there will be but (.) erm (.2) eh, well it's an interesting
 19 thing to look up at the Board now remember because you've
 20 got a Managing Director=
 21 Kate: =Uhuh=
 22 Justin: = right. Eh (.) you've got a Financial Director, you've got a
 23 Human Resources Director and you've got a Sales Director,
 24 right, that's it isn't it?
 25 Bill: And ops=
 26 Justin: =And Ops sorry. I forgot Dominic. ↑Famil(h)iar(h)ity breeds
 27 contempt sorry in Customer Ops, right. So you've basically
 28 got, I mean you (.) you haven't got a Marketing Director right?
 29 (.2) And you could argue that when Don was there you didn't
 30 have the Marketing Director.
 31 Sue: They haven't got a Sales Director now.
 32 Justin: Yes they haven't [got a Sales Director
 33 Sue: [Yeah, no sales director]
 34 Justin: [now right, yes that's
 35 right because he's bugging off all the time, right? So he's
 36 got his eye well and truly off the ball, right, if he's not careful
 37 anyway.
 38 Steve: Well he's ((laughter)) in Australia [at the
 39 Bill: [Even in Aus(h)tralia, he
 40 ha(h)sn't got his eye on the ball
 41 ((group laughter))

The exchange that begins on line 18 recasts the categories and category predicates of the Board members from 'personalities' into terms of functional roles, responsibilities and authority relations associated with the organizational structure. For example, the members present are invited to 'look up at the Board' – itself invoking a category of hierarchy, wherein hierarchical chains of command place certain incumbents 'above' and others 'below' on an organizational structure chart. They are also invited to remember the

key functional roles that members of the board are understood to occupy; these include the Managing Director (L.20), Financial Director (L.22), Human Resources (L.23) the Sales Director (L.23) and Customer Ops (Operations) (L.27). Those previously described as having the predicate “personalities” are now re-cast with a new set of predicates, namely “functional roles and responsibilities”. As such we might hear this as a situated provision of an ideal-typical account of a company structure.

This ideal-typical account is brought back ‘down to earth’ through the mapping of the *general* roles associated with company Boards worldwide with the *particular* attributes and practices associated with the particular Board in question. For instance, normative assessments are made of the adequacy of the *particular* members of the FitCo Board (L.34-41). Justin provides a series of morally discrepant formulations (Housley, 2003) within which role expectancies and obligations are mapped to and contrasted with ‘morally troubling activities’. For example, we are told that a functional ‘void’ exists because the Marketing Director position is currently absent (L. 28). Even more ‘troubling’, though, that even before he left the company, the role was not being undertaken properly (L. 30). Justin also claims that the Sales Director is ‘buggering of all the time’ (L.35) and ‘has his eye well and truly of the ball’ (L.36): a clear contrast to what we would typically expect of someone who is supposed to be in charge of sales in the UK subsidiary. The alignment work is heard to proceed through the fact that both Steve and Bill (L.38) collaborate in this production, who point to his psychical absence (L. 38) and functional ineffectiveness (L. 39-41).

To sum up, discursive leadership is hereby enacted primarily through the ‘framing’ of the company as ‘troubled’ in some way – through the absence, or inadequacies, of the top management team. The discursive ‘moves’ undertaken by the project leader were (a) framing the company as beset with ‘strategic failings’ in relation to key account management, and that (b) attributing these problems to the failures and absences in/of certain functional roles and responsibilities. In short, Justin frames the company as beset with failures amongst the top management team (category) to undertake the roles, responsibilities and duties (category predicates) they are normatively expected to fulfil as Directors. This category predicate work sets the stage for Justin to justify his overall ‘break’ of the master frame (namely, who ‘typically’ undertakes strategic change) and make a plea for strategic action by the Steering Group: something is seriously “wrong” with the company, and it is their *duty* to put it “right” because - as

previously established (see Excerpt 1 above) - they are the only team capable of doing so. This framing activity is presented diagrammatically in section B of Figure 1.

Excerpt 3

42 Justin: Well that's good to hear. (.2) That's really good to hear
43 because he's a ↑serious danger isn't he?
44 Bill: Yes he is.
45 Justin: He's a serious danger. (.) Well you see his time for the UK's
46 been diminished. >And he wasn't giving it in his own
47 admission he wasn't giving the quality time that he wanted to
48 before< (.) and previously it wasn't (.) but now he's got you
49 and Neil it's a bit different I think for him, it's better for him.
50 It's significantly different for him >but it's still bloody hard, it's
51 going to be even harder< (.) so, (.) so who is the Board that
52 you pass it up to? (.2.1) Now what I'm trying to say (.) eh (.)
53 eh that in a lot of business to business operations which is
54 what this is, although you know (.3) you've got a final
55 consumer (.) in the end it's a business to business operation.
56 (2.0) The Marketing Director often (.) fills a role of
57 coordination of functions in the integration of the accounts
58 strategy. (.5) >In other words they have to hang the whole
59 thing together around the salesmen< or the salesperson or
60 whatever. What eventually, what the sales guy walks into the
61 (.) uh (.) customers with, is an integrated package and it
62 doesn't come from Mark >but they're making it hang together
63 in whatever way, you know they're pushing the cross
64 functionality of the team, they're pushing the fact that
65 Customer Ops are saying the wrong things to these people.
66 They're pushing on behalf of the sales< (.2) that's not the way
67 marketing is in Fitcorp. And that essentially would be coming
68 from a ↑consumer business (1.5) where you've got, you're not
69 behaving as if you're business to business. (.) >The sales
70 team are behaving as if they're business to business< and
71 that's influencing trade obviously. But as a total business (.)
72 it's still (.5) >are we consumer marketers< (.2) >or are we
73 business to business marketing? < (2.0) Right? Now some of
74 the retail food brands and things like that >have got that much
75 more switched on about how they organise that between
76 them<, right (.2) and that's something that'll come out round
77 the table here. >But just to come back to the point, there's no
78 (.) there is nobody to pass it up to< (3.0) and (.) and even if
79 there was, people change slowly. (2.0) Right? Now you guys
80 have got no vested interests really other than making it work
81 better, (1.0) right? And y (.5) you have a different power
82 position (.) so you're not threatened as threatening to each
83 other (.) as the Board are to each other (.) right? (2.0) So it's
84 different.
85 Bill: Right.

On line 42 Justin states, then repeats and upgrades, that it is “good to hear” (L. 42) and “really good to hear” (L. 42) that the Sales Director is currently in Australia. What forms of category-bound organizational knowledge and reasoning are displayed and used here? And to what effect? Justin claims that having a Sales Director (category) far away in Australia is “good” because he represents a “serious danger” (L. 43) (predicate, i.e. being a danger to the Steering Group’s change plan). Here we see Justin “attributing dispositional descriptions to actors” (Edwards, 1994: 221) and deploying categorical knowledge and reasoning about what Sales Directors typically *think*, *do*, or *want*, based on their functional ‘patch’ or ‘turf’. As the reader, or indeed any student of management, will presumably already know, Sales Directors are typically concerned with their major customers (known as ‘Key Accounts’), and may even typically have their performance targets and performance-related pay tied to key account sales (as was indeed the case at FitCorp): the very thing that the Steering Group are planning to radically overhaul.

Incumbents of the hierarchical category “Directors” are also typically ‘known’ to have another predicate, namely forms of authority, power and influence: thereby representing another type of serious ‘threat’ to the change initiative. Thus, Justin deploys his *category predicate knowledge* to reason that now is an *ideal time* to embark upon their change initiative because the one Director who has both the *motive* and the *authority* to potentially ‘block’ or ‘derail’ their initiative is “off the scene”. The effect of this category predicate work is important, because it enables Justin to lead the project team to ‘see’ political ‘opportunities’ for progressing their change initiative: namely having a more integrated plan and productive conversations (L.3-4, L.12) between the organizational functions. Power (e.g. hierarchical authority) and politics (e.g. self-interested defence of ‘turf’) are thus a key part of the category-based knowledge that these members demonstrably use to render the organization intelligible and make their ‘strategic decisions’.

Further ‘degradation work’ (Goffman, 1967) is carried out (L.45 – 79) by working up the discrepancy between the standard and shared expectations associated with being a competent Board member: ‘giving quality time’ (L.47), ‘co-ordinating of functions’ (L.57), integration of the accounts strategy (L.57, 58), and generally ‘being switched on’ (L.75). The apparent absence of a person or group capable of tackling Key Account Management coordination problems is repeatedly mentioned: “who is the Board that you pass it up to?” (L.

51-52), “there is nobody to pass it up to” (L. 78). Again, the spatial reference to “up” invokes the image of an organizational structure chart that indicates *normatively* where strategic responsibility is expected to lie: i.e. with those “higher up”. The hierarchical authority structure of the company is thus portrayed as *deficient* or *dysfunctional* in relation to the cross-functional coordination of key accounts.

A ‘contrast class’ of categories is then created by Justin on L.80 – 84. What we see here is the constitution of two contrasting ‘morally self-organized groups’ (Jayyusi, 1984). Morally self-organized groups are social categories of collectives that are understood as bound by “some set of moral-practical beliefs, commitments, codes, values, interests, concerns” (Jayyusi, 1984: 48). Here two contrasting groups are constructed around a sense of ‘interests’ (or absence thereof) (Whittle & Mueller, 2011) to present one group (the Steering Group) as ‘better placed’ than the other group (the Board of Directors) to lead the change initiative. The first morally self-organized group (the Board of Directors) is furnished with the predicates of having a “power position” (L. 82) that makes them “threatening to each other” (L. 82): and therefore less likely to achieve the ‘integrated’ work he earlier advocated (L. 12). This set of moral attributes builds upon what was previously said about the group’s other predicates, namely:

- (a) their slow-to-change “personalities” (L. 7);
- (b) the absence of a Marketing Director (L. 28), a position left vacant since the previous incumbent was “sacked” a few months ago [source: field notes];
- (c) a previous incumbent who was deemed inept as a Marketing Director (L. 29-30);
- (d) a Sales Director with his “eye ... off the ball” (L. 36) who “wasn’t giving the quality time” (L. 47).

The second group constructed is the Steering Group itself, which is furnished with the predicate of having “no vested interests” (L. 80), in addition to the previous categorisation of them as wanting change and a more “integrated plan” (L. 12). These two categories are clearly normative in character, given the series of moral discrepancies (Housley & Fitzgerald, 2009) attributed to the Board.

Our analysis thus far shows that Justin enacts discursive leadership through his categorisation work, background knowledge, reasoning procedures, moral discrepancy accounts, alignment work and ‘framing’ of the situation using a combination of categories: (a) functional roles and responsibilities (Sales, Marketing, etc.), (b) hierarchical chains of command (Directors, Managers, etc.) and category predicates: (a) personality, (b)

organizational power and politics ('turf' and sectional interests). Through the framing of the 'definition of the situation' in terms of bravery, danger, personality, role discrepancies, location and proximity, Justin collaboratively establishes three 'social facts': (a) the company needs strategic change to sustain competitive advantage, (b) the Board are not well suited to lead the change themselves, and (c) now is an ideal time to undertake change. This framing activity is presented diagrammatically in sections B and C of Figure 1.

Excerpt 4

86 Justin: <So the only way I've seen it work (.3) really is not, (.3) is (.)
87 is for the Board to be the victim (.) of this level of
88 mana(h)gement, right?> >You turn them round not the other
89 way round.< (2.0) So I can't offer you that assu(h)rance; (.)
90 it's gonna be hard work to be honest (.) errr (.) But we've got
91 to get this changed, right ((reading words on powerpoint
92 slide – see Appendix)) (.) now >“↑account strategy is not a
93 persistent and central aspect of the board agenda”< (.) but I
94 tell you what is going to be a persistent and central aspect of
95 the director team's agenda, right we'll force it on= is
96 something from you guys about HighStreet [customer] and
97 something from you guys about the general issues (1.0)
98 about the way you think things should change. (1.0) And if –
99 we'll force the issue with Dennis. Now if Dennis says
100 “Wh:oa.” And if he can't be bothe:red to put it on the
101 agenda, right then you (.) eh (.) know we'll sort him out. (3.0)
102 he won't, right. He's got n:o fear of this at all >precisely the
103 opposite<, right. (1.0) Eh (.) And we'll start to write the Board
104 agenda. >Now you might think that's pie in the sky but it< (.)
105 it'll happen. (1.0) Okay? (.) Alright?
106 Sue: M:mm.
107 Bill: <Yeah> (.5)
108 Bill: This question of (.) when I (.) because we'll talk about
109 HighStreet with Dennis and Sam, what's this group's feeling
110 about who it should be? =
111 Justin: =I've got a completely open mind. (.5) I mean I've no idea.
112 [discussion moves on to which retail customer to trial the
113 new account management strategy with]

Here the project leader Justin changes the character of his account from *describing* the present 'failings' of the company to *prescribing* the future strategic changes he proposes. The Steering Group are given a 'vision' of change and a 'plan' for the future: how they will make change happen, and practical 'advice' on what activities and attributes (i.e. force, persistence,

belief, etc.) they will need to make the change happen (L.86-104). As he narrates the PowerPoint slides being displayed on the projector screen (see Slide 2 in the Appendix), the Steering Group is told that they will make the Board “a victim of this level of management” (L. 87-88), “turn them around” (L. 88), they will “force” issues onto the Board’s agenda (L. 93-95). They are told they will “force the issue” with the Managing Director, Dennis (L. 98-99), and that they will “sort him out” if he “can’t be bothered” (L. 99-101). This culminates with a formulation that the Steering Group will “write the Board agenda” (L. 103), which he claims might be seen as “pie in the sky” (L. 103) but, nonetheless, “it’ll happen” (L. 104). What is being formulated, then, is an account of the future which imagines a shift in authority relations between the two levels of the managerial hierarchy and a ‘break’ with their existing, taken-for-granted framing of who is ‘in charge’. The project leader refers to represented voices from hypothetical future occasions in order to outline potential scenarios of how organizational change might work out (Anderson, 2005; Emmison et al., 2011: 7) and how they will overcome any barriers or resistance. This framing activity is presented diagrammatically in section C of Figure 1. Sue and Bill then provide acknowledgement tokens in lines 106 and 107, before the discussion moves on to the next ‘topic of business’, namely the decision about which retail customer to choose for a ‘trial’ or ‘pilot’ of their new cross-functional, ‘concept-sell’ approach.

In this final exchange, Justin is not only enacting discursive leadership through his ‘framing’ of the situation, but his framing is also inviting those present to view the Steering Group as best placed, morally and pragmatically, to *lead the change initiative themselves* (Fairhurst, 2011: 93). Thus, Justin’s leadership role comprised energising *others* to undertake a strategic leadership role (Gioia & Chittipeddi, 1991; Bartunek et al., 1999): a challenge the group did indeed take up in the months that followed. A frame-shift slowly started to occur, in which this group of middle managers started to take active control of strategic decisions regarding key accounts themselves, rather than passively implementing strategic decisions made by the Board. The events that followed are discussed in more detail next, and are summarised in Figure 2. An overview of the categories and category predicates involved in this sensemaking episode is provided in Table 2 below.

Category	Category Predicate	Source
Board of Directors	Personalities – slow to change	“but they’re not going to change personality overnight” (L. 6-7) “people change slowly. (2.0) Right?” (L.

		79-80)
	Motives – desire and readiness for change	<p>“<u>they WANNA change</u>” (L. 16)</p> <p>“He’s [the M.D.] got n:o fear of this at all >precisely the opposite<, right.” (L. 102-103)</p>
	Roles – key functional roles absent or ineffective	<p>“you haven’t got a Marketing Director right?” (L. 28)</p> <p>“so who is the Board that you pass it [cross-functional integration issues] up to?” (L. 51-52)</p> <p>“there is nobody to pass it [cross-functional integration issues] up to” (L. 78)</p>
	Attributes – vested interests and power struggles	“you have a different power position (.) so you’re not threatened as threatening to each other (.) as the Board are to each other” (L. 82-84)
Sales Director	Proximity – being absent from UK office	<p>“he’s buggering off all the time, right?” (L. 35)</p> <p>“he’s ((laughter)) in Australia” (L. 38)</p>
	Activities – being inattentive to key account integration	<p>“got his eye well and truly off the ball” (L. 36)</p> <p>“he wasn’t giving it in his own admission he wasn’t giving the quality time that he wanted to” (L. 46-47)</p>
	Attributes – being a threat to Steering Group’s plans	“ <u>he’s a ↑serious danger isn’t he?</u> ” (L. 43)
Marketing Director ³	Roles & responsibilities – responsible for delivering ‘integrated package’ across functional departments	<p>“The Marketing Director often (.) fills a role of coordination of functions in the integration of the accounts strategy” (L. 56-57)</p> <p>“they’re making it hang together in whatever way, you know they’re pushing the cross functionality of the team” (L. 58-59)</p>
FitCorp	Type (of business) – selling business-to-business or business-to-consumer	<p>“that essentially would be coming from a <u>↑consumer</u> business” (L. 67-68)</p> <p>“you’re behaving as if you’re business to business” (L. 69)</p>

³ The position of Marketing Director was currently vacant.

		“But as a total business (.) it’s still (.5) >are we consumer marketers< (.2) >or are we business to business marketing?” (L. 71-73)
Steering Group	Attributes – absence of vested interests and power position	“Now you guys have got no vested interests really other than making it work better, (1.0) right?” (L. 80-81) “you have a different power position” (L. 82)
	Relationships (prospective: in future) – with Board of Directors	“the Board to be the victim (.) of this level of mana(h)gement, right?> >You turn them round not the other way round.” (L. 87-88) “And we’ll start to write the Board agenda.” (103-104)
	Attributes (prospective: in future) – being ‘brave’, ‘forceful’ and uncompromising in dictating agenda of Board and M.D.	“We’re going to have to be a bit brave” (L. 11) “right we’ll force it on” (L. 95) “we’ll force the issue with Dennis ... And if he can’t be bothe:red to put it on the agenda, right then you (.) eh (.) know we’ll sort him out” (L. 99-101)

Table 2 – Categories and category predicates used by Steering Group and group leader to facilitate sensemaking about strategic change

FRAMING AND THE ENACTMENT OF A STRATEGIC CHANGE INITIATIVE

What happened next? Did the strategic plans envisioned by Justin and the Steering Group get implemented? If so, what difference did it make? Given space considerations, we now offer a brief synopsis of the overall series of strategic changes that followed in the subsequent two years traced by the study. Figure 2 also offers a visual representation of the ‘before’ and ‘after’ to show the wide-reaching consequences of the leadership process we have studied.

--- Insert Figure 2 here ---

The strategic change proceeded as follows. The group developed a simple but radical plan: each major customer should have a single, cohesive, key account plan that would be delivered through integrated, cross-functional teamwork. This represented a major change to their previous routines and their taken-for-granted ways of ‘seeing’ and ‘doing’ things (depicted on the left of Figure 2). Up until now, the Board set the key account strategy (or lack thereof). Interaction was hierarchical and top-down. Work was functionally divided into ‘silos’ and ‘levels’. Short-term sales targets superseded building long-term brand value. Sales were based on product features and price negotiations. Following this pivotal moment and shift in sensemaking, led by Justin, these old ways of working were slowly but surely broken down and a series of changes were implemented (depicted on the right of Figure 2). The middle managers in the Steering Group persuaded the Board to place Key Account Management as a standing item on their agenda. Cross-functional team working was established. Information was ‘pooled’ and shared across functions. Product-based account managers were replaced with a single account manager (representing the whole product range) for each key account. Marketing strategy was shifted towards a ‘niche’ sub-brand concept. Sales strategy changed from product-based feature-based selling towards a “concept-sell” based on branding and design. New ‘exclusive’ trade agreements were also secured.

The discursive leadership of the project leader Justin was, of course, much broader than the short excerpt studied here and ‘leadership’ was also enacted by a range of other actors. Hence, our aim is not to attribute the success (or otherwise) of the whole strategic change initiative to Justin, nor to one brief, albeit significant, interactional ‘moment’. Nonetheless, it is important to note that the leader’s ‘framing’ of the situation – the need for change to the company’s Key Account Management (KAM), the presumed ‘inadequacy’ and ‘incapability’ of the Board of Directors to lead the change, and the need for wide-reaching and profound changes in the way in which the functional departments interacted with each other, with key account customers and with their superiors – was by and large accepted and implemented by the Steering Group members. As a result, a strategic ‘shift’ had taken place which took the UK subsidiary away from a ‘product sales’ strategy founded on silo-based, business-to-business short term/high volume “sell-in” towards a more ‘concept sell’ strategy founded on cross-functional, integrated longer-term business-to-consumer “sell-through” and brand value (see Figure 2).

CONCLUSION

In this paper, we have advanced existing research by showing how actors make sense of the formal organizational schema (e.g. structure charts, divisions of labour, job descriptions, etc.) through interpretive practices of categorisation, category predication work and framing in interaction. Our study has shown how formal organizational structure categories – such as functional roles like ‘Sales’ or authority positions such as ‘Director’ – ‘come alive’ and get ‘put to use’ through their methodical use in processes of strategic interaction (Boden, 1994; Samra-Fredericks, 2010; Iszatt-White, 2011). Moreover, we have shown that organizational change is made both possible and desirable through *breaking down* existing ‘frames’ for interpreting the formal organizational structure – a process we call ‘frame breaking’, and re-building new frames for interpreting the formal organizational structure – a process we call ‘re-framing’ (Reger et al., 1994).

Our study shows how a strategic change initiative was enacted through, amongst other things, the ‘category predicate work’ of a team leader (see Figure 1). The leader produced a vision and plan for strategic change by questioning and challenging (frame-breaking) and changing (re-framing) the forms of activities and attributes – or *category predicates* - normally associated with the Top Management Team, such as ‘fixing’ organizational failings and ‘leading’ strategic change. The leader ‘gave sense’ to the strategic situation by framing the company as beset with Key Account Management problems, and framing the top management team as not well placed to address these problems. Through this framing and category predication work, the leader mobilised the collective effort of a group of middle managers to change existing authority relationships and lead a major strategic change initiative. The resulting collective action of the group, traced by this study over a three-year period, resulted in a series of organizational changes, including changes to patterns of decision-making, communication, knowledge-sharing, formal structure, marketing strategy, sales strategy and operations management (see Figure 2). The study therefore provides insights into the processes through which leaders de-stabilise existing interpretive schemes and create new interpretive schemes (Gioia & Chittipeddi, 1991: 434).

The findings of this study of framing and category predication work adds to our knowledge of how categorisation ‘makes a difference’. Categorisation is indeed a linguistic practice, but it is not ‘just talk’. In the case of the Cerro Grande fire studied by Weick and Sutcliffe (2007: 13), the failure to categorise the seemingly out of control fire as an ‘escaped fire’ led to catastrophic consequences. In contrast, the use of organizational categories can

enable a disaster situation to be averted, as in the case of the ‘distress’ category used by the police officer in trouble studied by Fairhurst (2007: 36). Indeed, other studies of high reliability organizations have shown the importance of organizational structure categories in particular, such as the categories associated with functional divisions of labour and hierarchical chains of command, in crisis sensemaking (Gephart, 1993; Weick, 2001).

Whilst the situation may not have been ‘life or death’ for the individual managers in this study, the ability to ‘diagnose’ and ‘respond’ to strategic problems is certainly a key *organizational* survival issue. Indeed, we have shown how a strategic change initiative was founded on the discursive leadership skills of ‘frame-breaking’ and ‘re-framing’ through category-based knowledge and reasoning about (a) *what* the strategic ‘problem’ was, (b) *who* was best placed to resolve it, and (c) *how* it should be resolved. Our study thereby contributes to an emergent research agenda that seeks to study organizational structure, not through the ‘formal schemata’ such as the structure chart or job descriptions, but rather through the forms of situated sensemaking and practical reasoning that members use to make structural categories meaningful. We have contributed to this research agenda by developing a framework founded on Membership Categorisation Analysis and related ethnomethodological approaches that enables us to study, not only the categories, but also the *category-bound knowledge and reasoning* enacted through what we term ‘category predication work’.

Category predication work is, we propose, a key component of discursive leadership practice. Leadership involves the management of meaning, which in this case involved the provision of “intelligible formulations” (Shotter, 1993) of ‘where we are’, ‘what’s wrong’, ‘where we need to go’, and ‘how we are going to get there’. While leaders may be instrumental in providing categories and framing category predicates, this is not a lone activity but rather is accomplished inter-subjectively through social interaction (Edwards, 1994; Wodak et al., 2011; Iszatt-White, 2011). Discursive leadership, then, concerns the ability to ‘align’ and ‘mobilize’ often diverse and dispersed organizational actors around a common ‘definition of the situation’. Moreover, in “an increasingly complex world, language that is nuanced, precise, and eloquent enables leaders to draw distinctions that others may not see or be able to describe” (Fairhurst, 2011: 5). Our study has shown that these distinctions are not only distinctions *between* various categories, but also distinctions *within* the categories in terms of the types of activities or attributes upon which they are predicated. In our study, the category predication work of a project leader facilitated a major shift in the activities undertaken by middle managers, as they started to change their relationship with

their superiors, shape the agenda of the top management team and take charge of strategic decisions about key accounts. The contribution to management practice therefore lies in enabling managers to understand how their stock of knowledge and reasoning about categories in the form of ‘category predicates’ is not only consequential for their strategic decision-making, but also open to change.

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[Please see separate files for Figure 1 and 2.]

Appendix – Project leader’s PowerPoint slides being shown on screen at time of transcript excerpt

❖ “.... everyone has a set of objectives but they don't seem to match, we don't get around a table and say are all these objectives talking to the same ‘piece’....”

❖ “the planning process here is screwed we do not align”

❖ “.... departments carry on doing what they want to do and they are getting further and further apart”

❖ “the first reaction is bang we can’t do it”

(quotes from interviews with senior management, from first phase of consultancy work)

- ❖ The requisite multi-functionality of a coherent Business-2-Retail 'total-product' is not fully perceived or managed at any level
- ❖ The complete functionality of account strategy only converge organisationally, as an integrated issue, in the Director group
- ❖ Account strategy is not a persistent and central aspect of the Director team's agenda

- ❖ To develop and implement, for [Key Account 1], an integrated 'total-product' marketing and customer relationship development plan; together with the supporting management processes
- ❖ Development of an action plan to enhance [FitCo] B-2-R 'marketing' effectiveness, it's customer relationship management and development practice with all key accounts(i.e. how do we install the model we develop around [Key Account 1])

